

Subject	CSA Distribution Day (in person)
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Purpose	What to do on a CSA distribution day
Items required	Credentials, GrownBy Printer
Frequency	On distribution schedule

What the farmer does

Get orders on the truck/ready at the farm

- ☐ Login to GrownBy
- ☐ Navigate to "Distributions"
- ☐ Navigate to "Daily Summary". Review and export, as necessary, "Daily Summary". The daily summary includes all the items that are needed to fulfill orders for that day. The list can be narrowed by date or location. Default is the next 7 days. Reports may run faster with fewer days. If you only have one location, skip the next step.
- ☐ Navigate to "Location Summary". Review and export, as necessary, "Location Summary". This report will verify where boxes/products need to go.

Export customer list for in-person distributions

- ☐ Navigate to "Sign-in Sheets".
- ☐ Click "Export to PDF". This is your sign-in sheet for the distributions. The first page is a summary; the following pages include what each customer is picking up at that day, location, and time.
- ☐ If you need payment information, click "Export to .csv". This sheet will give you the amount due of the most recent invoice per customer. There are additional fields on this page that may be useful for your distribution.
- ☐ OPTIONAL click "Generate emails". If you'd like to send a customized email to the group, GrownBy offers a list of emails to copy into Mailchimp, your email, or other newsletter managers.

What GrownBy does

- Sends customers a reminders email 24 hours before the start or distribution
- Send push notifications to customers before scheduled pick up



SOP Distribution Day
GrownBy Version 3.0 - SOP updated May 2023